



CONROE ISD

DEMOGRAPHIC STUDY

Fall 2022

POPULATION AND SURVEY ANALYSTS
WWW.PASATX.COM

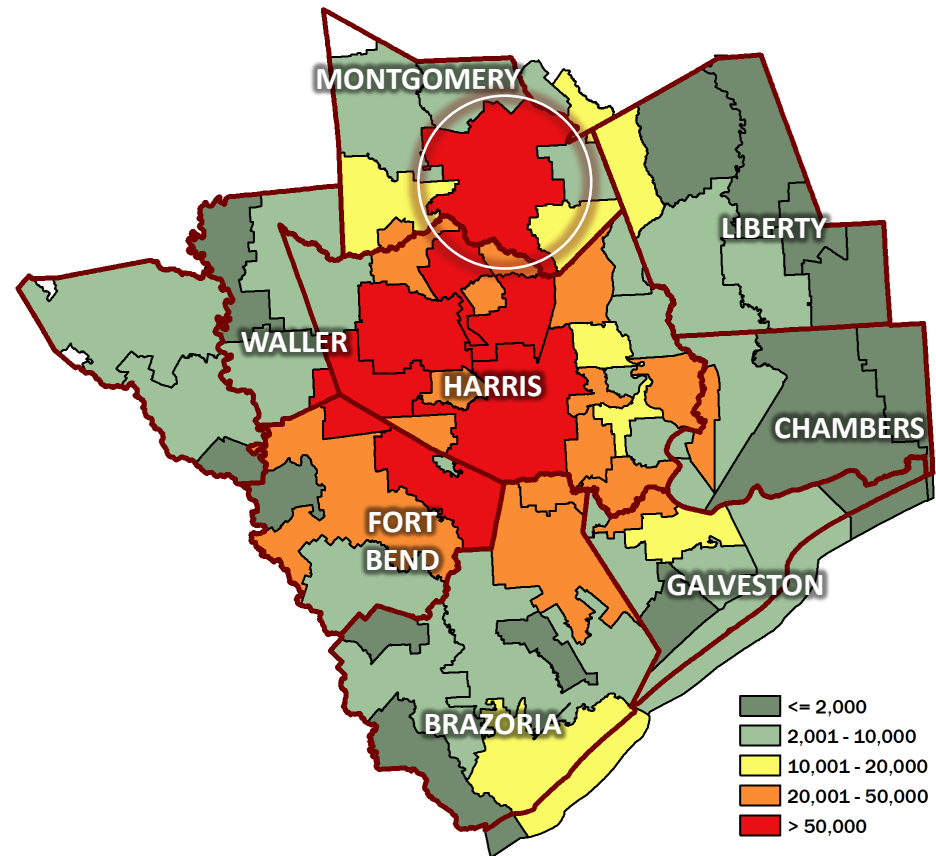
DEMOGRAPHIC TRENDS

Total Enrollment

PEIMS Snapshot 2021-22



	School District	Enrollment
1	Houston ISD	194,607
2	Cy-Fair ISD	117,217
3	Katy ISD	88,368
4	Fort Bend ISD	77,545
5	Conroe ISD	67,761
6	Aldine ISD	61,633
7	Klein ISD	53,294
8	Pasadena ISD	49,326
9	Humble ISD	48,112
10	Clear Creek ISD	40,832
11	Alief ISD	40,664
12	Lamar CISD	39,579
13	Spring Branch ISD	33,545
14	Spring ISD	33,425
15	Alvin ISD	28,085

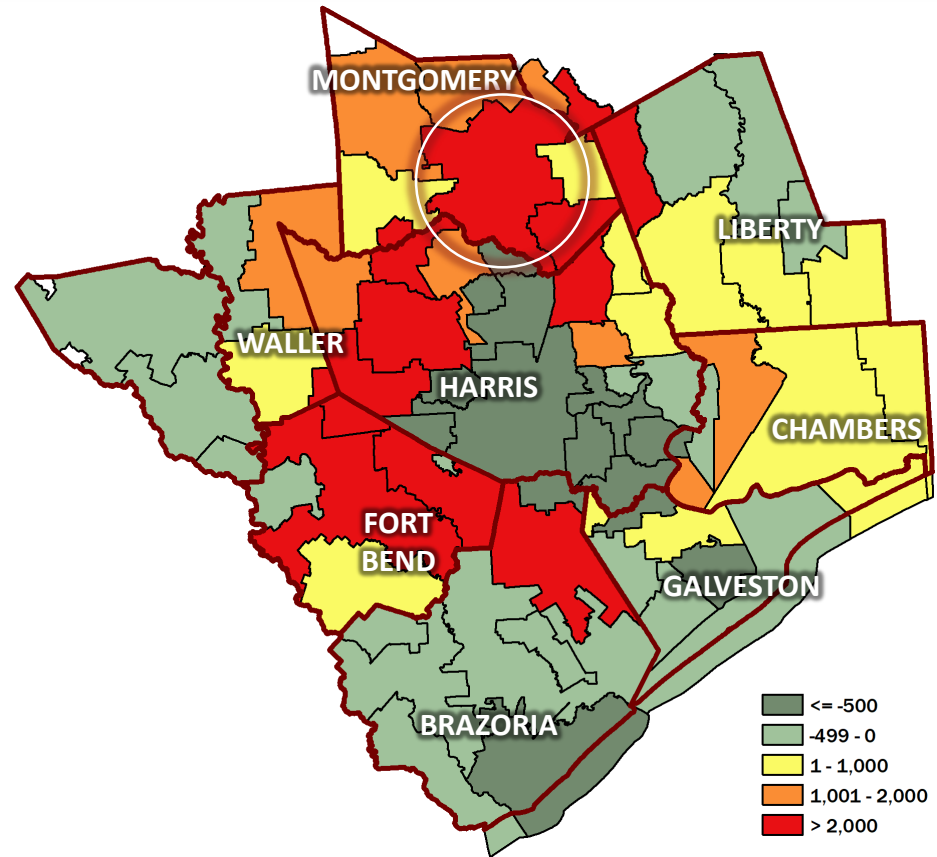


Numeric Change in Enrollment

Fall 2016 – Fall 2021



	School District	Change
1	Katy ISD	12,940
2	Lamar CISD	8,750
3	Conroe ISD	7,997
4	Humble ISD	6,888
5	Cleveland ISD	6,132
6	Tomball ISD	5,330
7	Alvin ISD	4,498
8	Fort Bend ISD	3,399
9	New Caney ISD	2,439
10	Cy-Fair ISD	2,349
11	Sheldon ISD	1,686
12	Barbers Hill ISD	1,552
13	Waller ISD	1,512
14	Klein ISD	1,484
15	Willis ISD	1,121

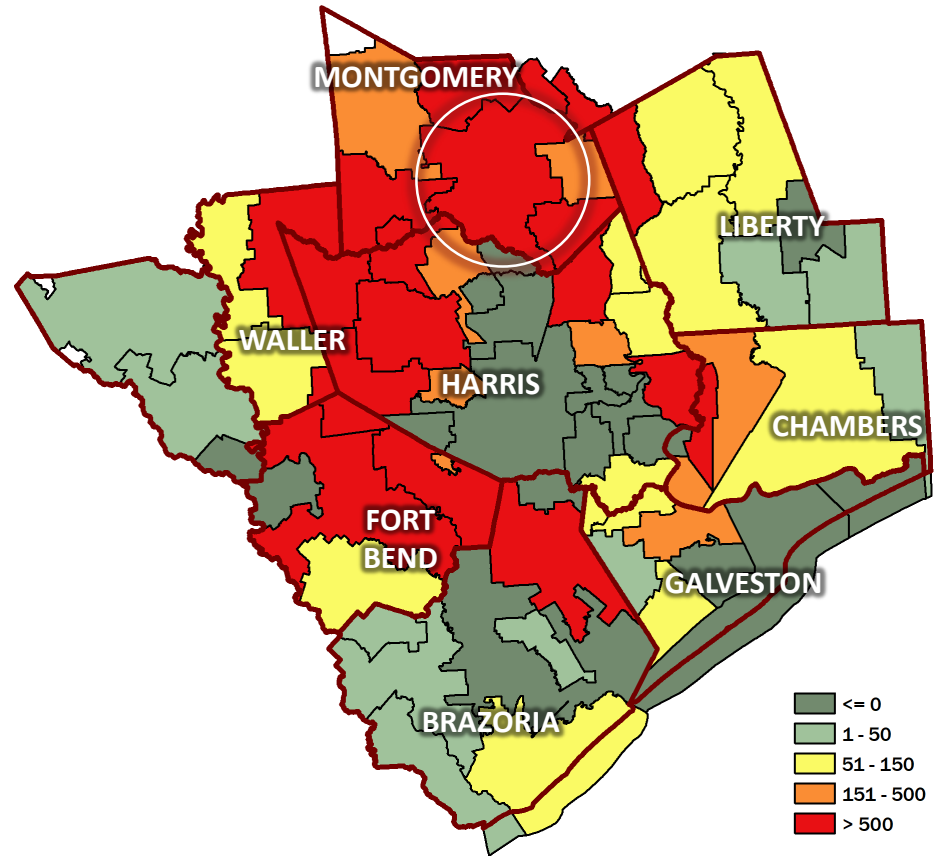


Numeric Change in Total Enrollment

Fall 2020 – Fall 2021



	School District	Change
1	Katy ISD	4,192
2	Conroe ISD	3,198
3	Lamar CISD	3,060
4	Humble ISD	2,584
5	Cy-Fair ISD	2,336
6	Cleveland ISD	1,972
7	Tomball ISD	1,596
8	Alvin ISD	1,079
9	New Caney ISD	842
10	Fort Bend ISD	810
11	Waller ISD	624
12	Goose Creek CISD	590
13	Willis ISD	550
14	Magnolia ISD	536
15	Klein ISD	470



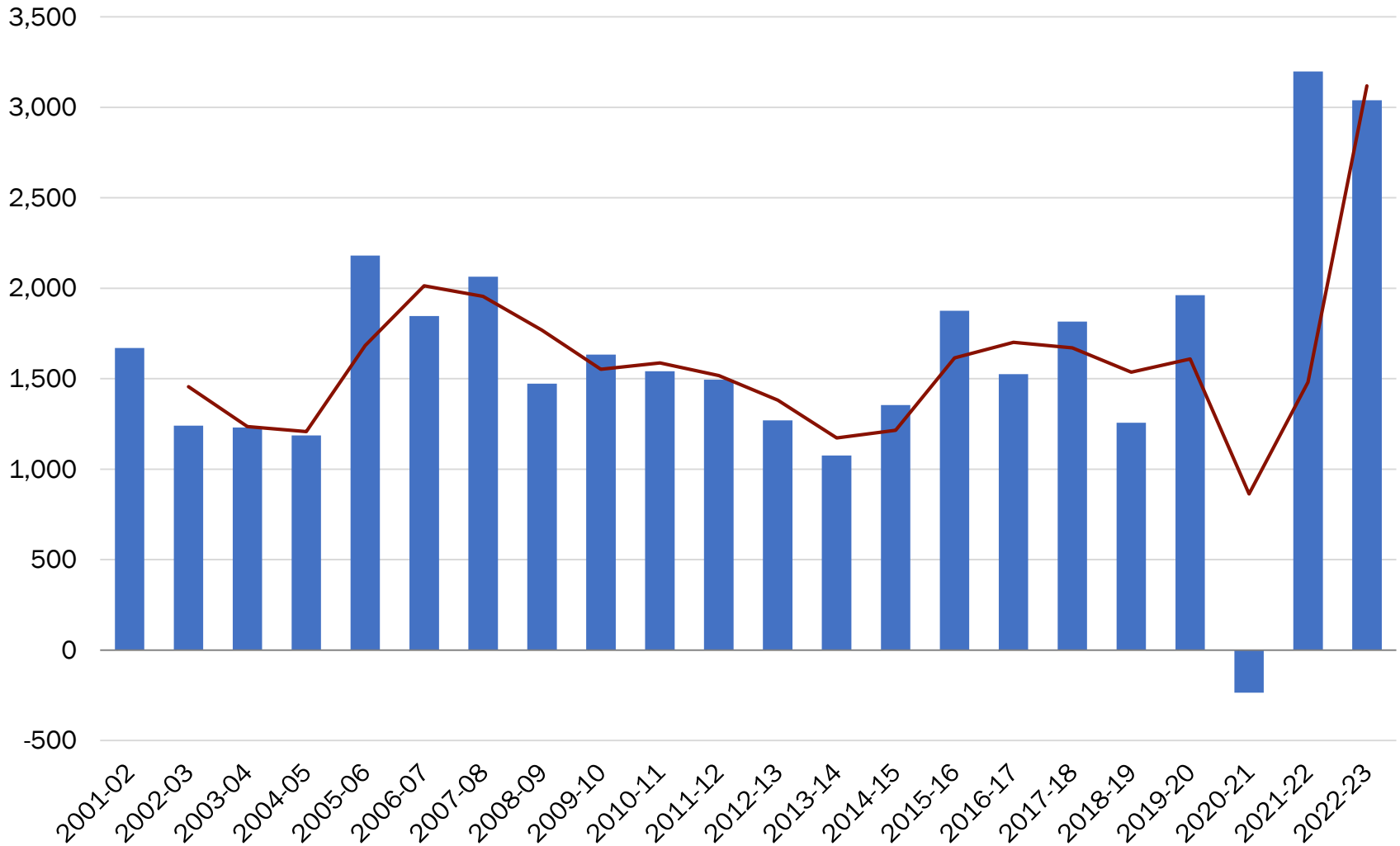
Demographic Characteristics



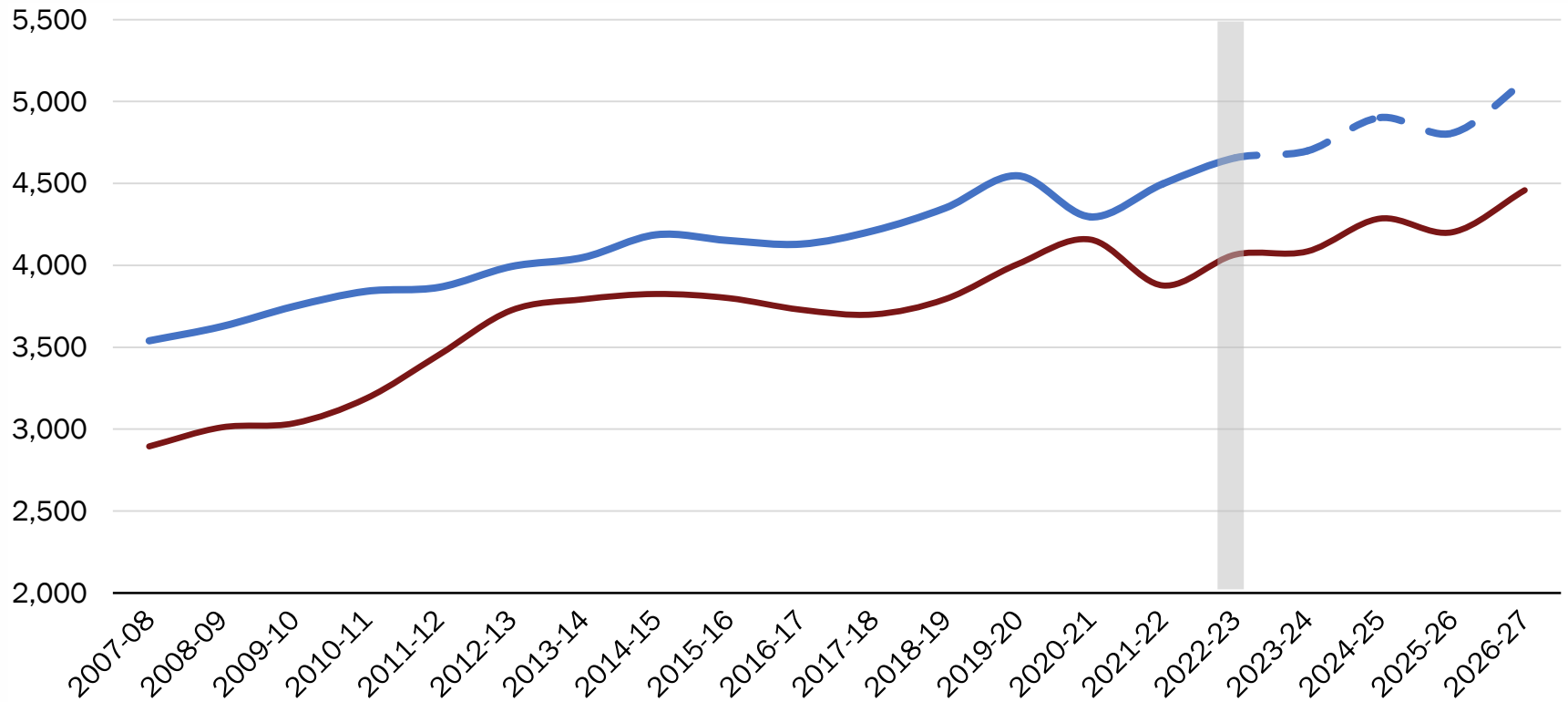
	Conroe ISD	Houston Metro
 Median Age	35.7	34.5
 Median Income	\$85,883	\$69,328
 Median Home Value	\$261,300	\$208,100
 Population (Ages 5 – 17)	20%	19%
 Mean Travel Time	29.8	30.0
 Bachelor's Degree or Higher	41%	34%

Source: U.S. Census Bureau, American Community Survey,
2020 5-Year Estimate;

Total Enrollment Change



KG Enrollment vs. Live Births (5 Years Prior)



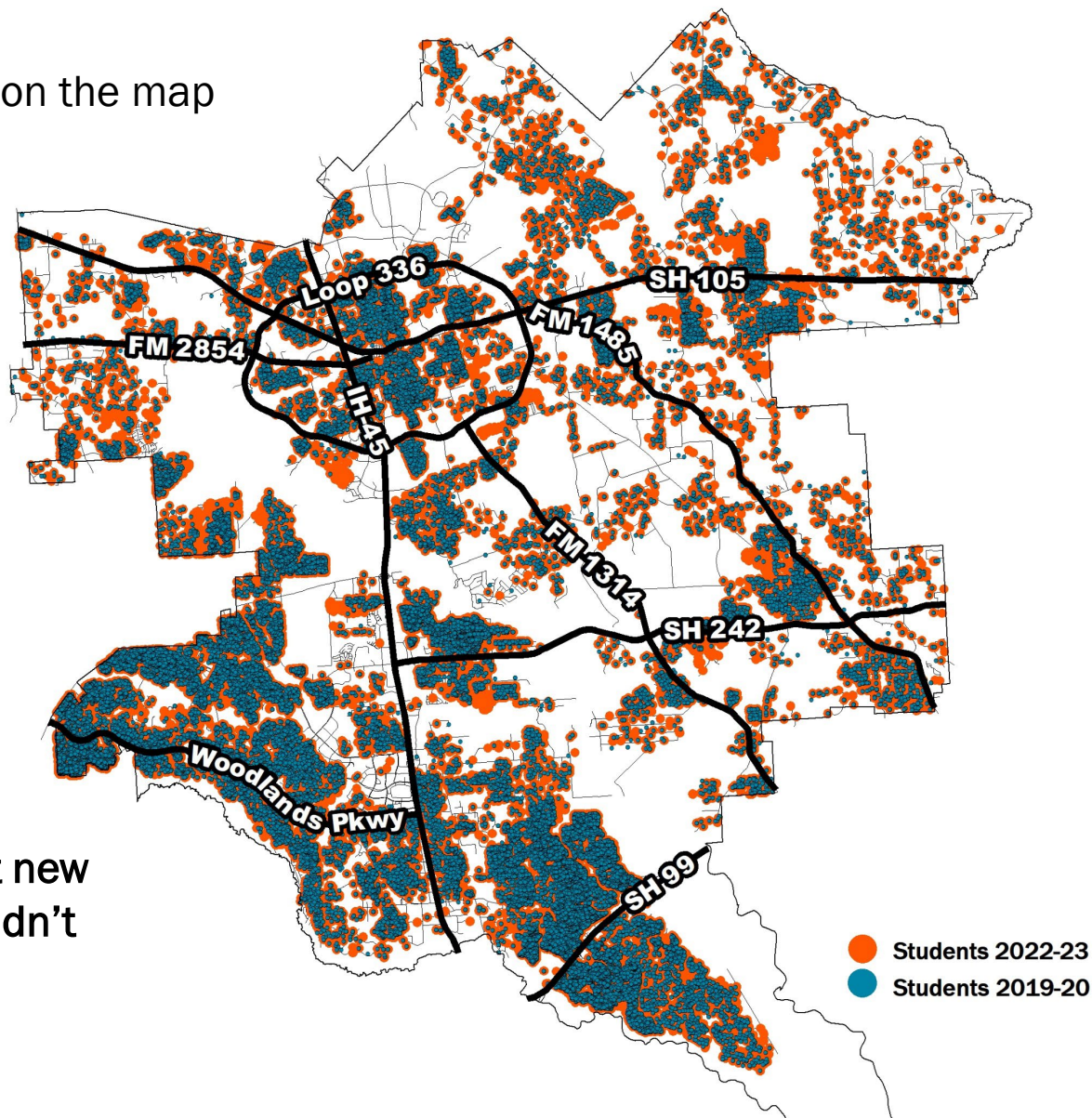
—Births (adjusted five years) —Kindergarten Enrollment

CURRENT STUDENTS



Student Geo-code

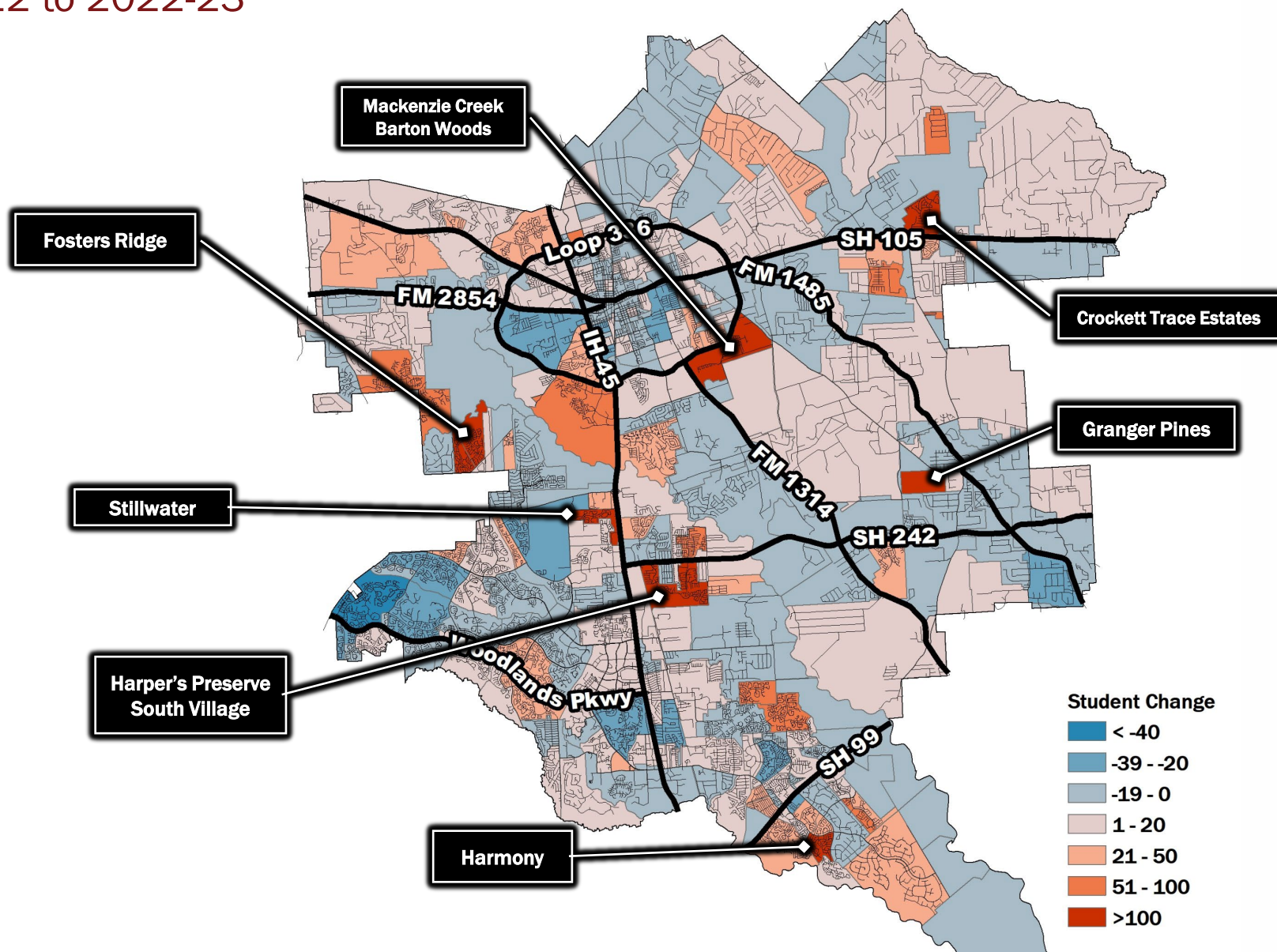
- Place each student on the map
- 99% accuracy
- Starting point for projections



Orange areas highlight new neighborhoods that didn't exist in 2019-20

Past Student Growth by Planning Unit

2021-22 to 2022-23



Students per Household

Single-Family

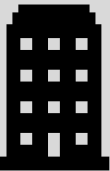


Multi-Family



Student Growth by Housing Type



	2021	2022	Numeric Change	% Change	Pct of Growth
 Subdivisions - Built Out	42,757	43,065	308	1%	12%
 Subdivisions - Actively Developing	9,294	11,160	1,866	20%	70%
 Multi-Family	6,859	7,089	230	3%	9%
 Manufactured Homes	4,183	4,403	220	5%	8%

ECONOMY



Economy & Housing Market



01 Employment

- MSA workforce has recovered to its February 2020 (pre-pandemic) size
- Conroe Park North, Deison Technology Park, The Woodlands Town Center, and City Place are all significant regional employment centers that help attract new residents to Conroe ISD

02 Economic Outlook

- Inflation, consumer confidence, and fears of a looming recession are shaping the 2022 economy
- The Federal Reserve has now raised interest rates five times since March and is expected to continue raising rates until inflation is under control
- The National average for a 30-year fixed rate mortgage is nearly 7%, more than double a year ago, making home ownership unattainable for certain potential buyers.

03 Housing Market

- Robust in late 2020 & 2021, due to lower interest rates, record prices, and high demand
- Now market is cooling
 - Permits and sales have slowed since early 2022
 - Prices are depreciating
 - Inventories are on the rise

Mortgage Rates & Affordability



PRINCIPAL & INTEREST PAYMENT ONLY

Home Price	Mortgage Rate					
	3.00%	4.00%	5.00%	6.00%	7.00%	8.00%
\$250,000	\$843	\$955	\$1,074	\$1,199	\$1,331	\$1,468
\$300,000	\$1,012	\$1,146	\$1,288	\$1,439	\$1,597	\$1,761
\$350,000	\$1,180	\$1,337	\$1,503	\$1,679	\$1,863	\$2,055
\$400,000	\$1,349	\$1,528	\$1,718	\$1,919	\$2,129	\$2,348
\$500,000	\$1,686	\$1,910	\$2,147	\$2,398	\$2,661	\$2,935
\$600,000	\$2,024	\$2,292	\$2,577	\$2,878	\$3,193	\$3,522

Calculations assume a 30-year loan term & 80% loan-to-value ratio. Taxes and insurance are not included.

HOUSING



Single-Family Housing



Over the next 10 years, PASA projects 35,676 single-family units (67% of total new housing projections).



New Master Planned Communities

Land in Conroe is now in high demand & several new, large communities have expanded or started development.

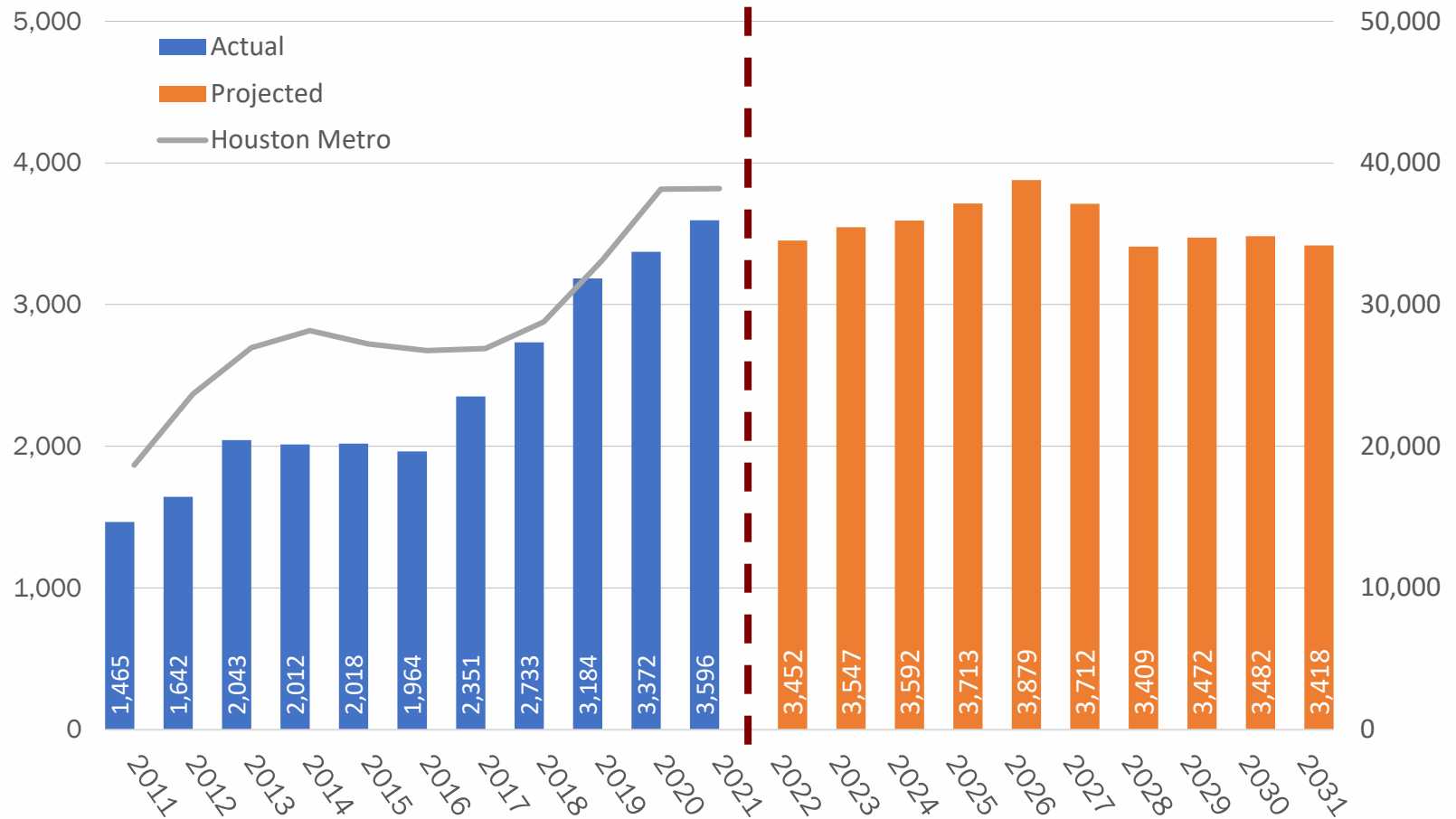
Manufactured Housing

A dynamic shift is occurring in the development of manufactured housing. 4,696 new occupancies are projected across the District through 2032.

Annual Housing Closings + Projected Occupancies



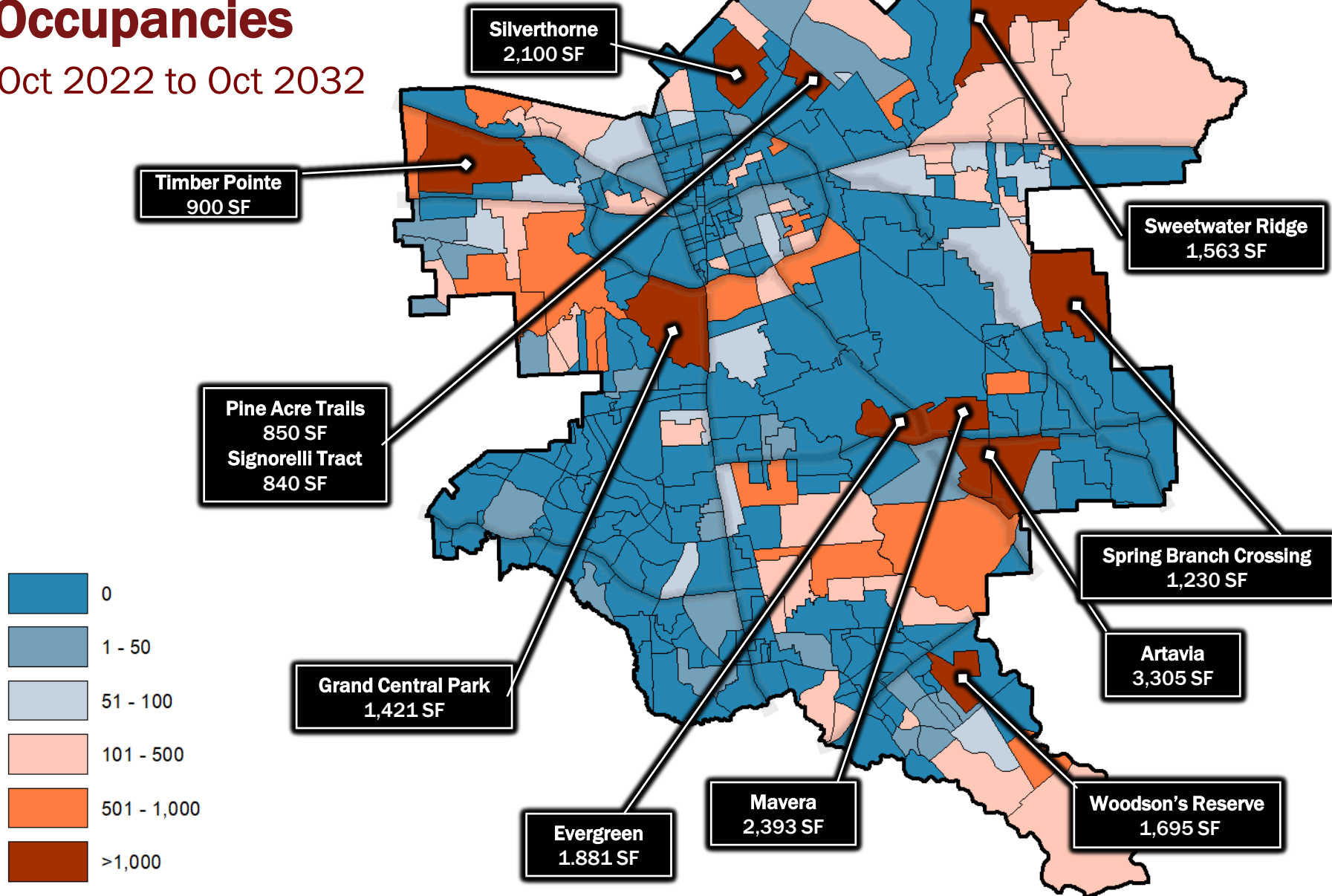
Single-Family in Conroe ISD



Metrostudy historical data for Q2 annual closings through 2022 and PASA projected occupancies from 2022 (Oct. to Oct.)
DOES NOT INCLUDE MANUFACTURED HOUSING.

Projected Single-Family (SF) Occupancies

Oct 2022 to Oct 2032

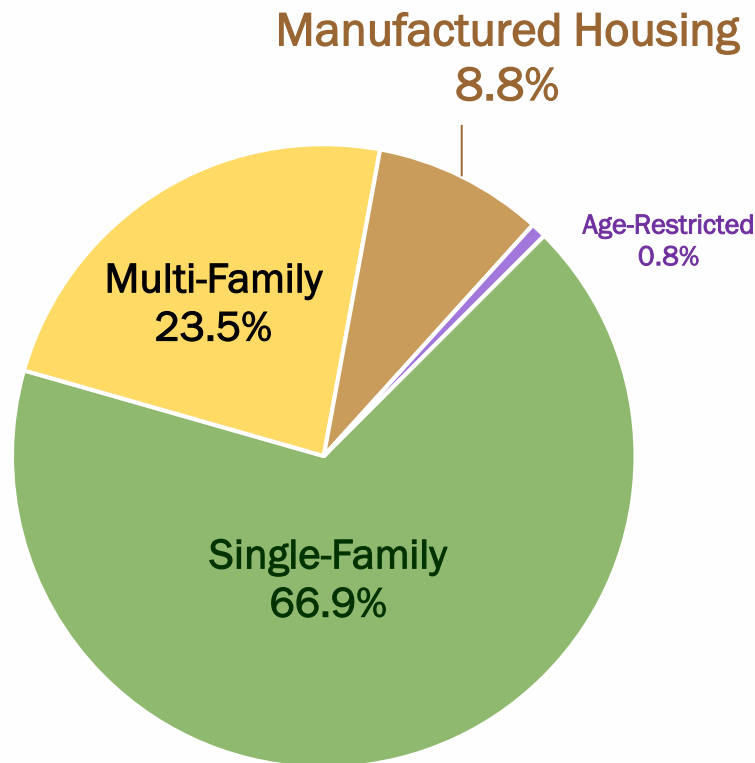


INCLUDES MANUFACTURED HOUSING

Manufactured Housing



Almost 4,700 manufactured home occupancies are projected through 2032. This is nearly 9% of total projected new housing, and more than 7x the number projected in the 2018-19 study.



Acreage Developments

- Larger tracts, less dense
- Student ratios > 1.0
- *Far east: Spring Branch Crossing, White Rock, Pine Rock Estates, Legacy Pines*

Communities with Amenities

- Smaller tracts, more dense
- Student ratios 0.7 to 0.8
- *Smaller infill tracts: Pine Acre Trails, Reserve at Sleepy Hollow*

Largest Growth Subdivisions and Manufactured Home Communities

Oct 2022 to Oct 2032



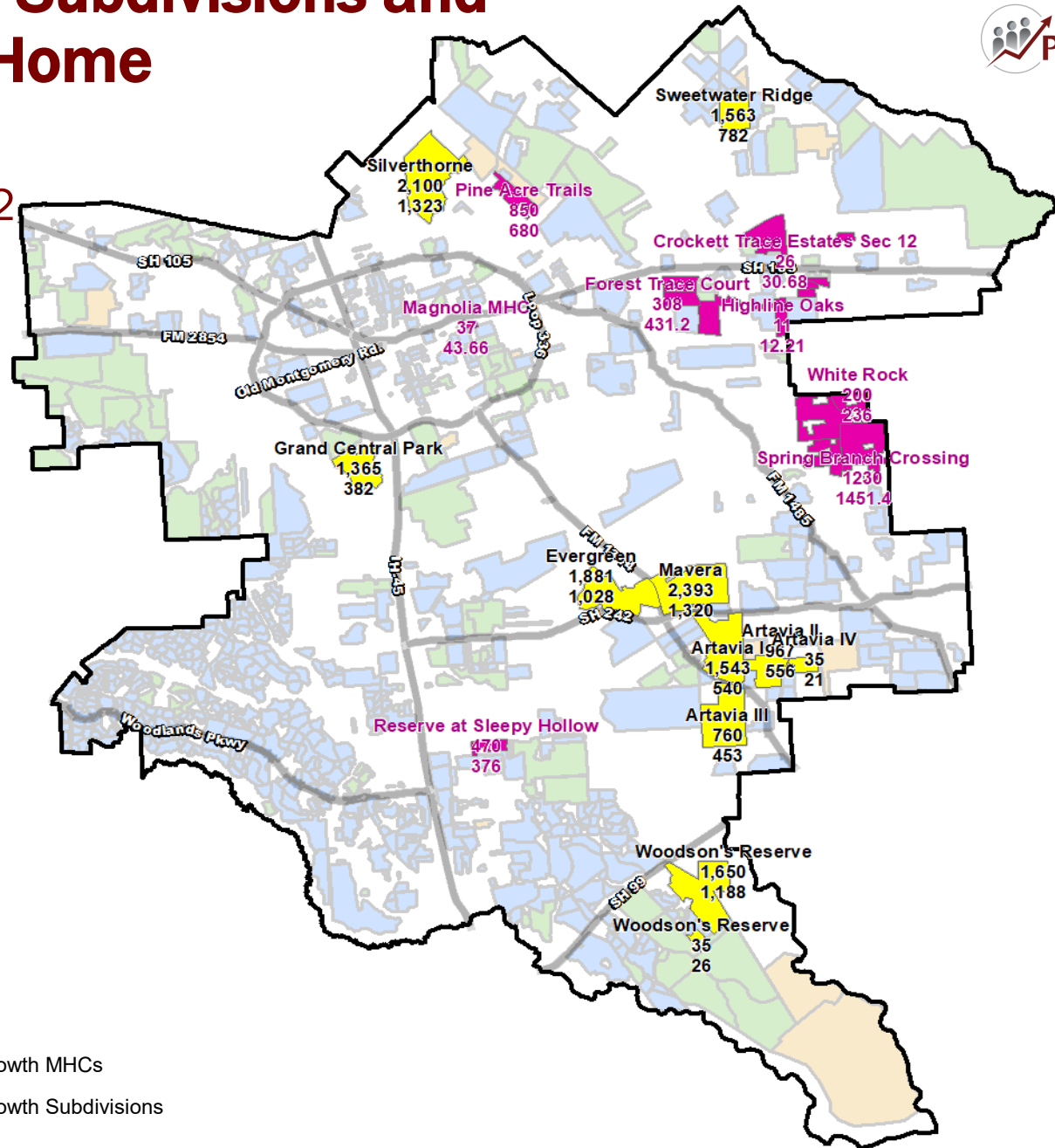
Labels:

Development Name

Projected Housing Units

Projected EE-12 Students

Single-Family



Multi-Family Housing



~10.8%

of current students live in
Multi-Family units

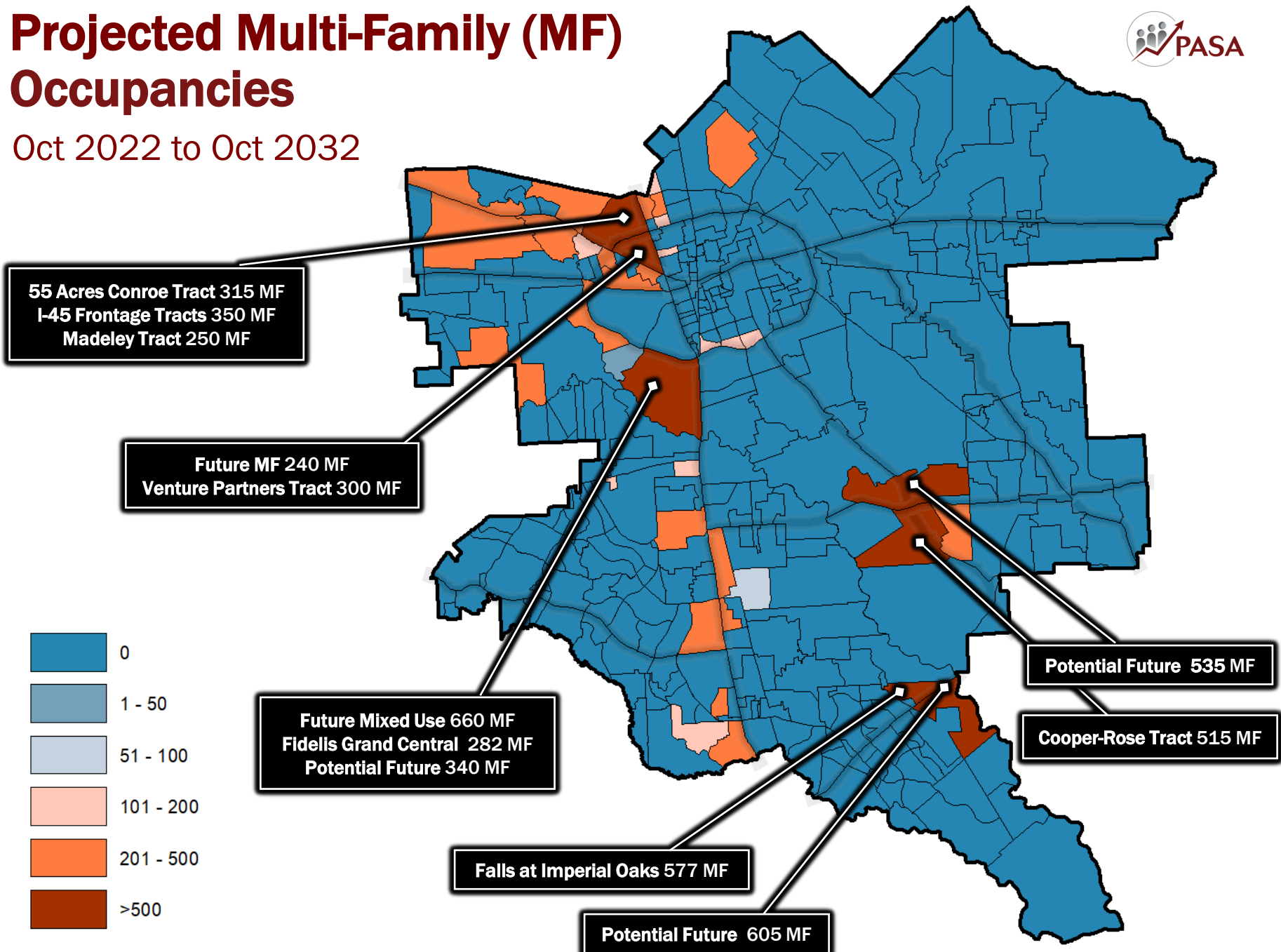
23.5%

of all future housing units are
Multi-Family units

**12,509 total MF units are projected in
the coming decade**

Projected Multi-Family (MF) Occupancies

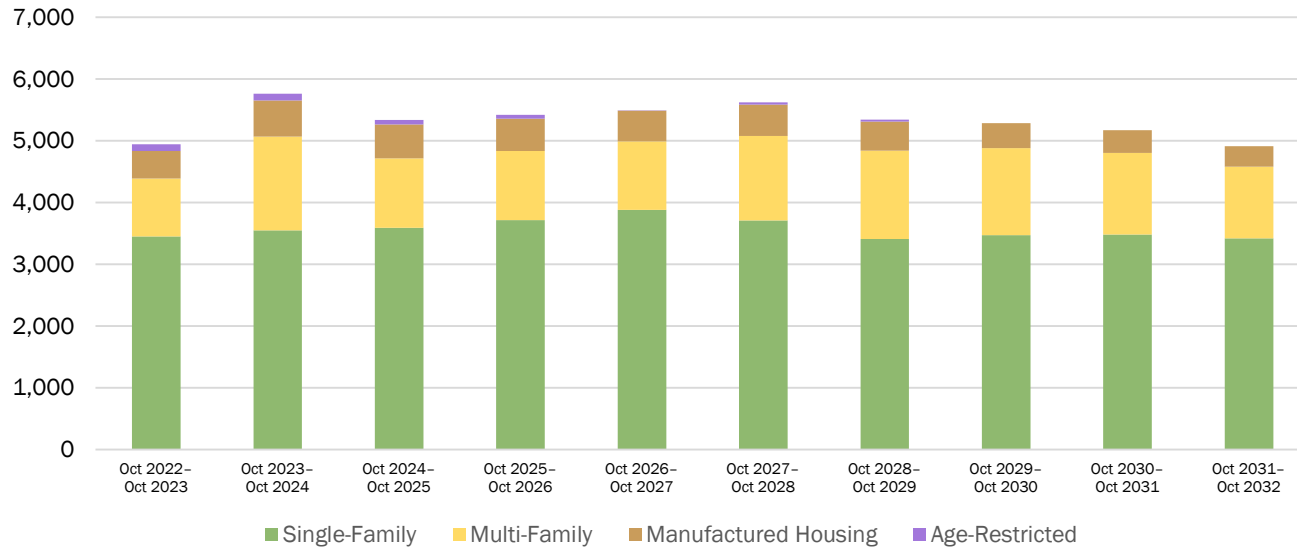
Oct 2022 to Oct 2032



New Housing Projections by Year of Occupancy



Housing Projections by Year of Occupancy



Housing Type	Oct 2022–Oct 2023	Oct 2023–Oct 2024	Oct 2024–Oct 2025	Oct 2025–Oct 2026	Oct 2026–Oct 2027	Oct 2027–Oct 2028	Oct 2028–Oct 2029	Oct 2029–Oct 2030	Oct 2030–Oct 2031	Oct 2031–Oct 2032	Oct 2022–Oct 2032
Single-Family	3,452	3,547	3,592	3,713	3,879	3,712	3,409	3,472	3,482	3,418	35,676
Multi-Family	937	1,524	1,125	1,120	1,113	1,365	1,430	1,410	1,320	1,165	12,509
Manufactured Housing	447	586	551	525	498	512	472	405	370	330	4,696
Age-Restricted	110	105	69	65	5	35	35	0	0	0	424
Total	4,946	5,762	5,337	5,423	5,495	5,624	5,346	5,287	5,172	4,913	53,305

STUDENT PROJECTIONS



Factors Incorporated into Student Projections



New Housing Construction

Largest driver of future growth

Birth rates

Slight changes in birth rate + in-migration of young families

Incoming KG class sizes

Historically 3-5% annual growth

Aging of the existing student population

Accounts for bulges in the population

Regeneration in existing neighborhoods

Where are younger families moving in to replace empty-nesters?

New Charter Schools

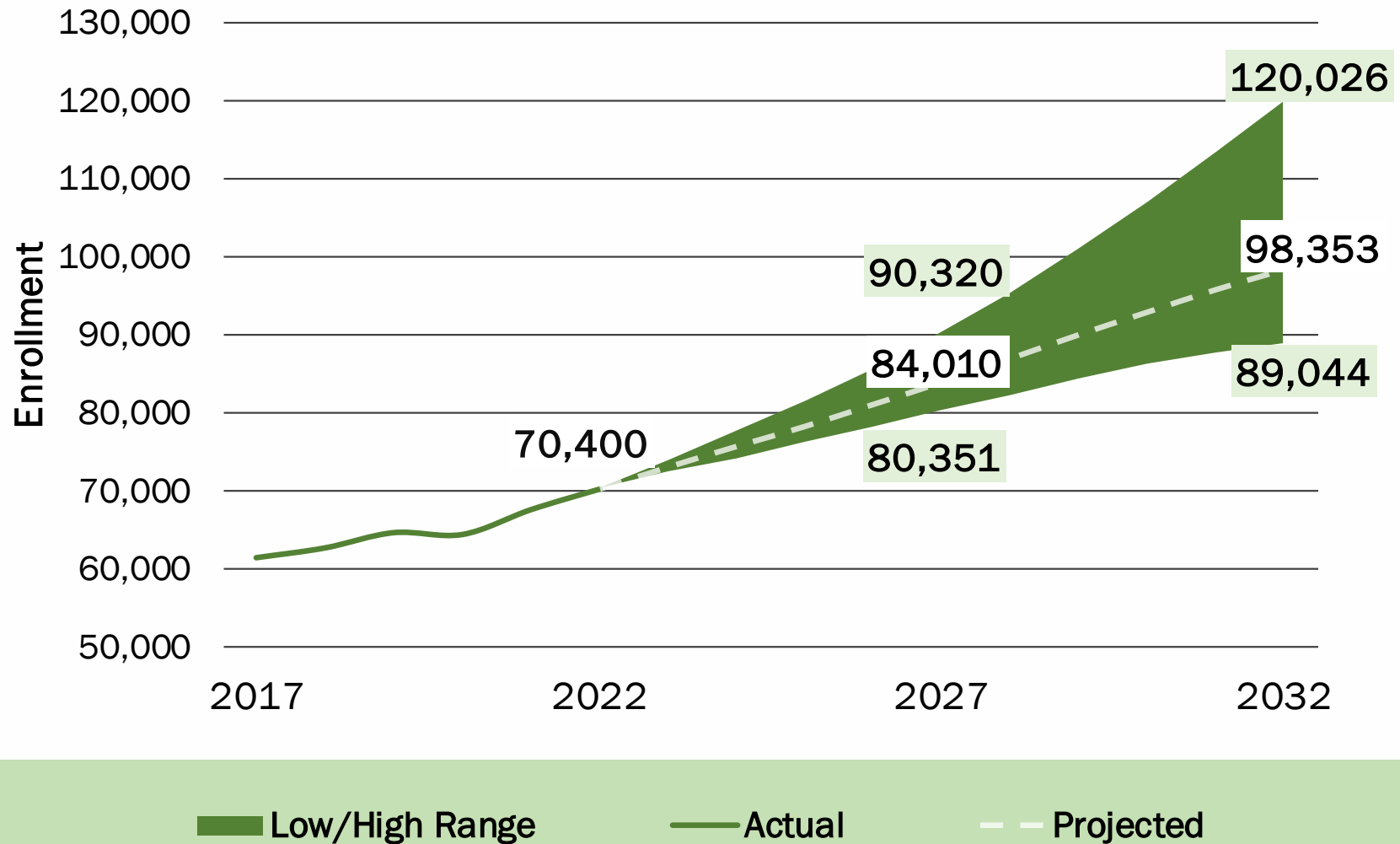
No known, major plans for expansion that will greatly impact CISD

Moderate Growth Scenario

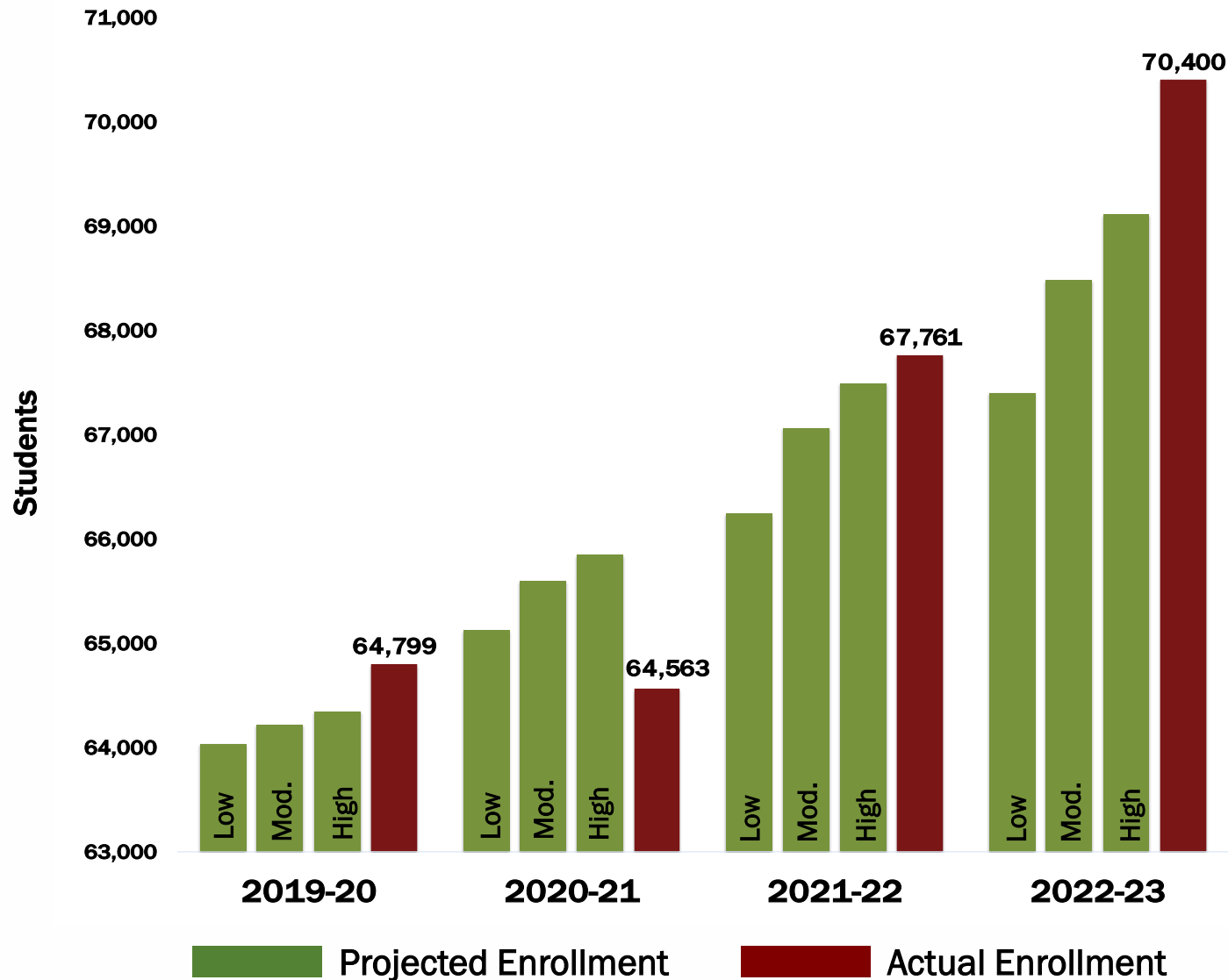


	2023	2024	2025	2026	2027
Enrollment	73,195	75,832	78,386	81,194	84,010
% Growth	3.71%	3.60%	3.37%	3.58%	3.47%
Growth	2,621	2,637	2,554	2,808	2,816
	2028	2029	2030	2031	2032
Enrollment	87,025	90,065	92,936	95,800	98,353
% Growth	3.59%	3.49%	3.19%	3.08%	2.66%
Growth	3,015	3,040	2,871	2,864	2,553

Three Scenarios of Growth



Historical Projections vs. Enrollment

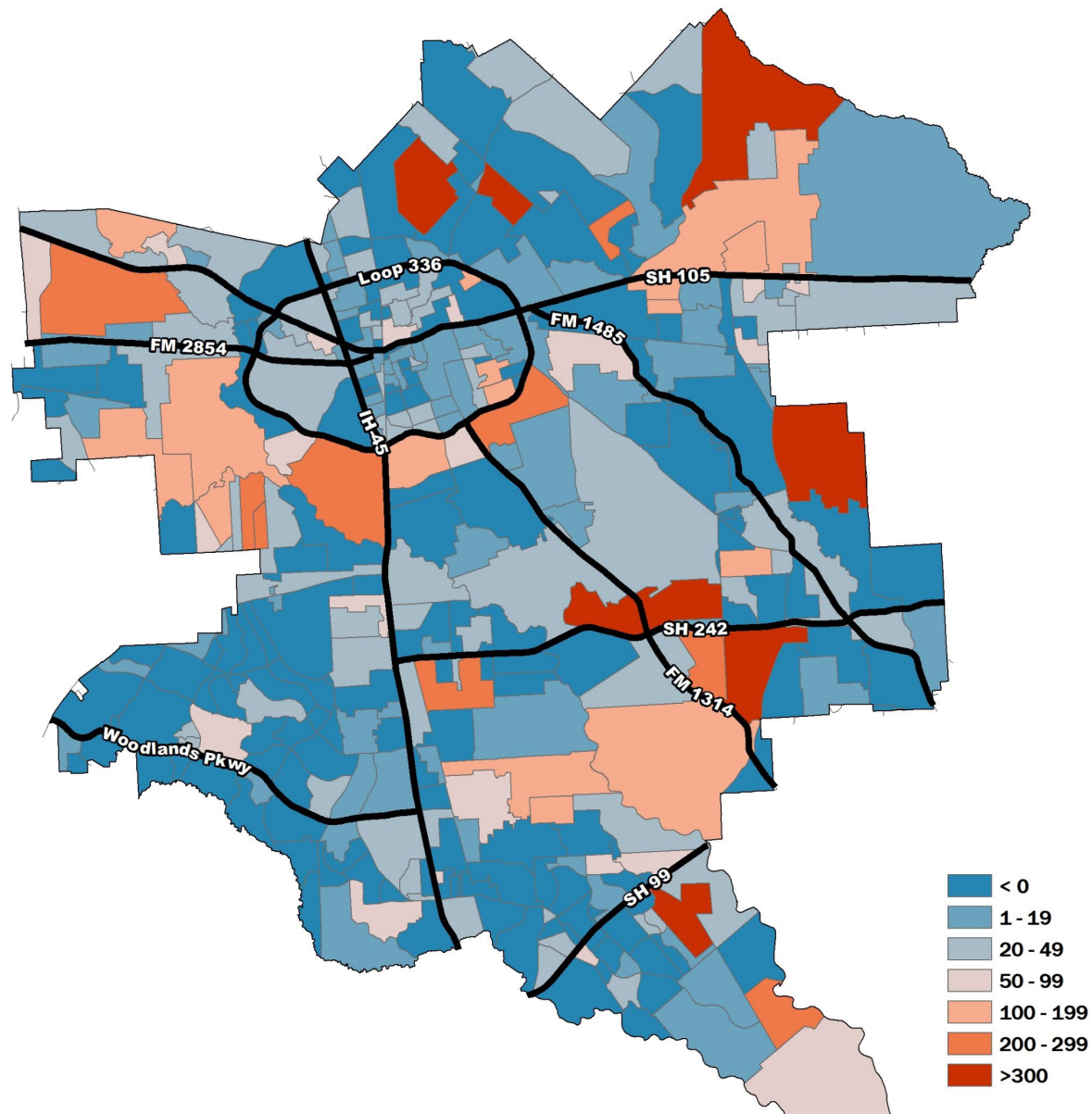


LONG-RANGE PLANNING



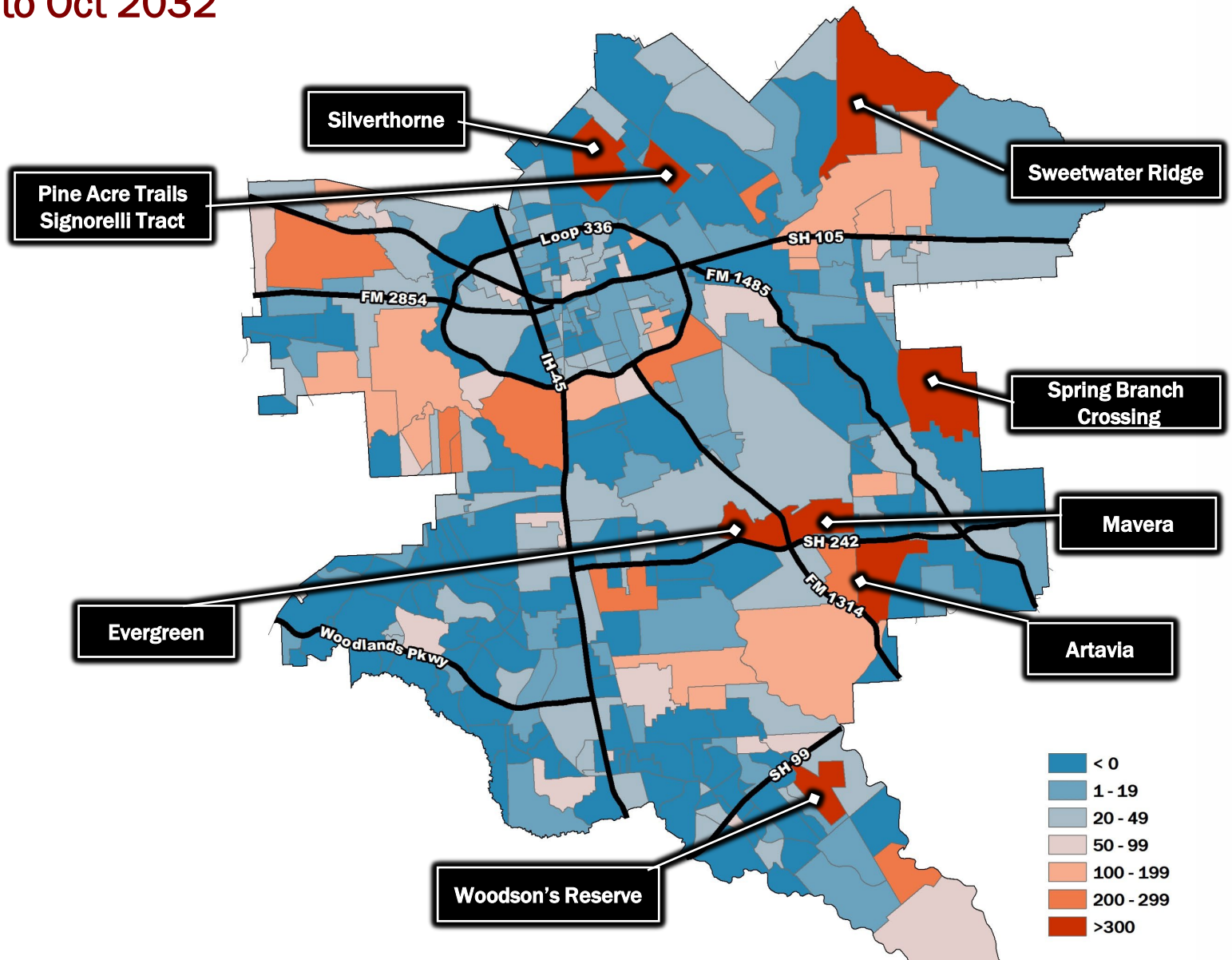
Projected Growth in Elementary Students

Oct 2022 to Oct 2032



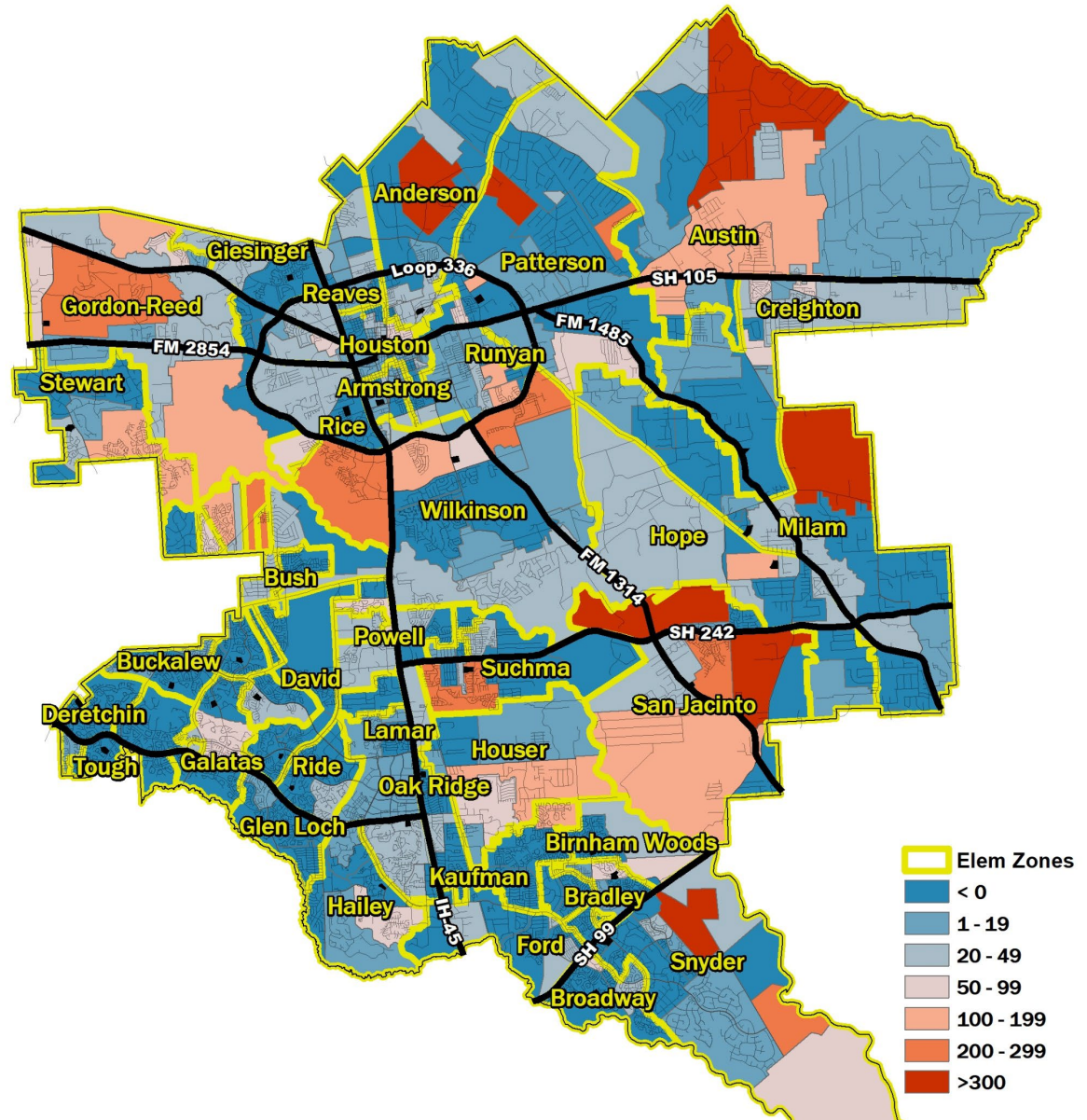
Projected Growth in Elementary Students

Oct 2022 to Oct 2032



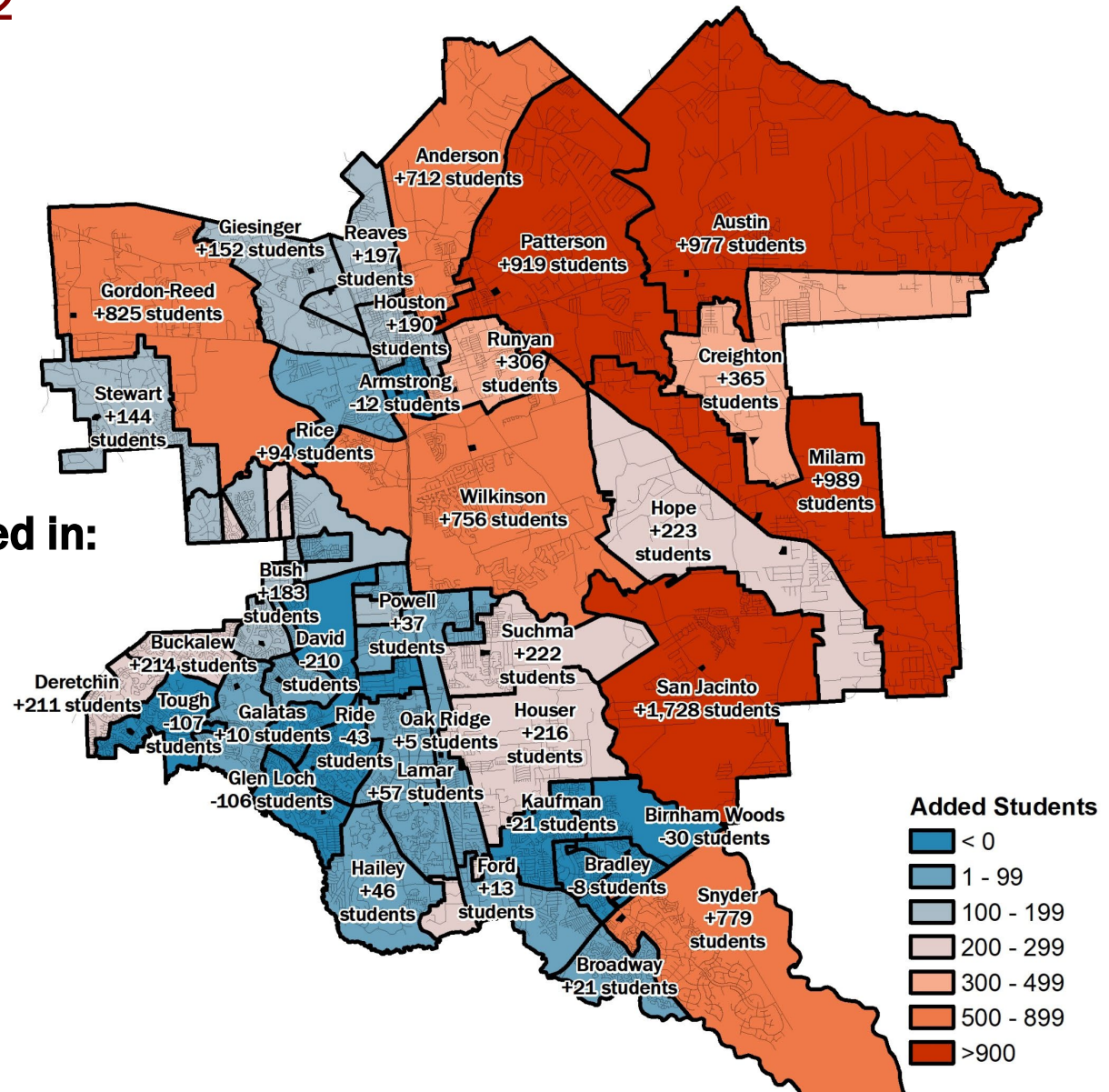
Projected Growth in Elementary Students

Oct 2022 to Oct 2032



Projected Growth in Elementary Students

Oct 2022 to Oct 2032



Most growth projected in:

San Jacinto
Milam
Austin
Patterson
Anderson
Gordon-Reed
Wilkinson
Snyder

Projected EE-4th Grade Resident Students by Attendance Zone



Elementary School	Projected Resident EE-4th Grade Students											
	Capacity	2022-23	2023-24	2024-25	2025-26	2026-27	2027-28	2028-29	2029-30	2030-31	2031-32	2032-33
Anderson Elementary	700	675	701	743	788	845	907	988	1,075	1,174	1,279	1,387
Armstrong Elementary	650	540	550	549	549	557	568	568	560	553	538	528
Austin Elementary	875	956	1,085	1,196	1,270	1,346	1,457	1,570	1,687	1,781	1,865	1,933
Birnam Woods Elementary	950	1,023	1,020	1,024	1,017	1,040	1,045	1,035	1,030	1,027	1,008	993
Bradley Elementary	950	1,039	1,090	1,117	1,144	1,152	1,155	1,136	1,112	1,088	1,055	1,031
Broadway Elementary	950	1,411	1,472	1,482	1,486	1,507	1,504	1,495	1,483	1,472	1,456	1,432
Buckalew Elementary	750	698	750	814	859	892	940	960	950	938	923	912
Bush Elementary	800	944	1,000	1,049	1,078	1,110	1,127	1,134	1,136	1,138	1,135	1,127
Creighton Elementary	650	933	1,055	1,132	1,193	1,226	1,261	1,278	1,284	1,293	1,298	1,298
David Elementary	650	637	632	611	583	562	548	521	497	473	445	427
Deretchin Elementary	700	716	735	719	769	780	780	798	829	864	896	927
Ford Elementary	700	837	851	842	844	857	867	867	864	861	856	850
Galatas Elementary	775	810	824	819	822	816	817	815	816	819	821	820
Giesinger Elementary	650	757	764	750	759	752	783	812	841	867	889	909
Glen Loch Elementary	575	487	469	456	427	404	394	391	391	391	388	381
Gordon-Reed Elementary	650	483	551	611	686	768	867	969	1,055	1,140	1,223	1,308
Hailey Elementary	600	687	703	731	742	773	770	762	756	750	742	733
Hope Elementary	925	603	632	676	730	788	833	852	847	840	832	826
Houser Elementary	700	519	540	600	634	662	682	698	702	713	724	735
Houston Elementary	900	612	651	707	728	762	779	789	795	799	802	802
Kaufman Elementary	900	1,003	1,029	1,026	1,032	1,044	1,051	1,040	1,029	1,019	1,001	982
Lamar Elementary	700	720	748	761	769	772	769	772	776	781	784	777
Milam Elementary	900	477	522	601	700	794	898	1,019	1,141	1,258	1,364	1,466
Oak Ridge Elementary	575	514	512	527	549	554	556	552	545	538	529	519
Patterson Elementary	925	960	1,061	1,168	1,290	1,420	1,558	1,659	1,728	1,797	1,848	1,879
Powell Elementary	775	932	974	969	973	959	963	970	977	980	976	969
Reaves Elementary	675	678	722	749	767	807	833	847	857	865	869	875
Rice Elementary	625	601	634	648	669	688	695	701	704	707	703	695
Ride Elementary	575	446	464	458	458	456	453	445	437	426	413	403
Runyan Elementary	575	672	743	794	833	879	913	948	960	972	978	978
San Jacinto Elementary	725	539	599	680	792	930	1,107	1,318	1,542	1,789	2,031	2,267
Snyder Elementary	950	1,218	1,288	1,361	1,417	1,495	1,589	1,684	1,777	1,836	1,911	1,997
Stewart Elementary	650	645	708	734	766	793	793	794	798	799	796	789
Suchma Flex	650	1,044	1,143	1,189	1,243	1,271	1,278	1,282	1,287	1,289	1,282	1,266
Tough Elementary	775	665	650	639	643	634	625	611	599	585	568	558
Wilkinson Elementary	900	1,004	1,106	1,171	1,263	1,323	1,397	1,480	1,560	1,644	1,707	1,760
Projected Resident Elementary Students	26,975	27,485	28,978	30,103	31,272	32,418	33,562	34,560	35,427	36,266	36,935	37,539

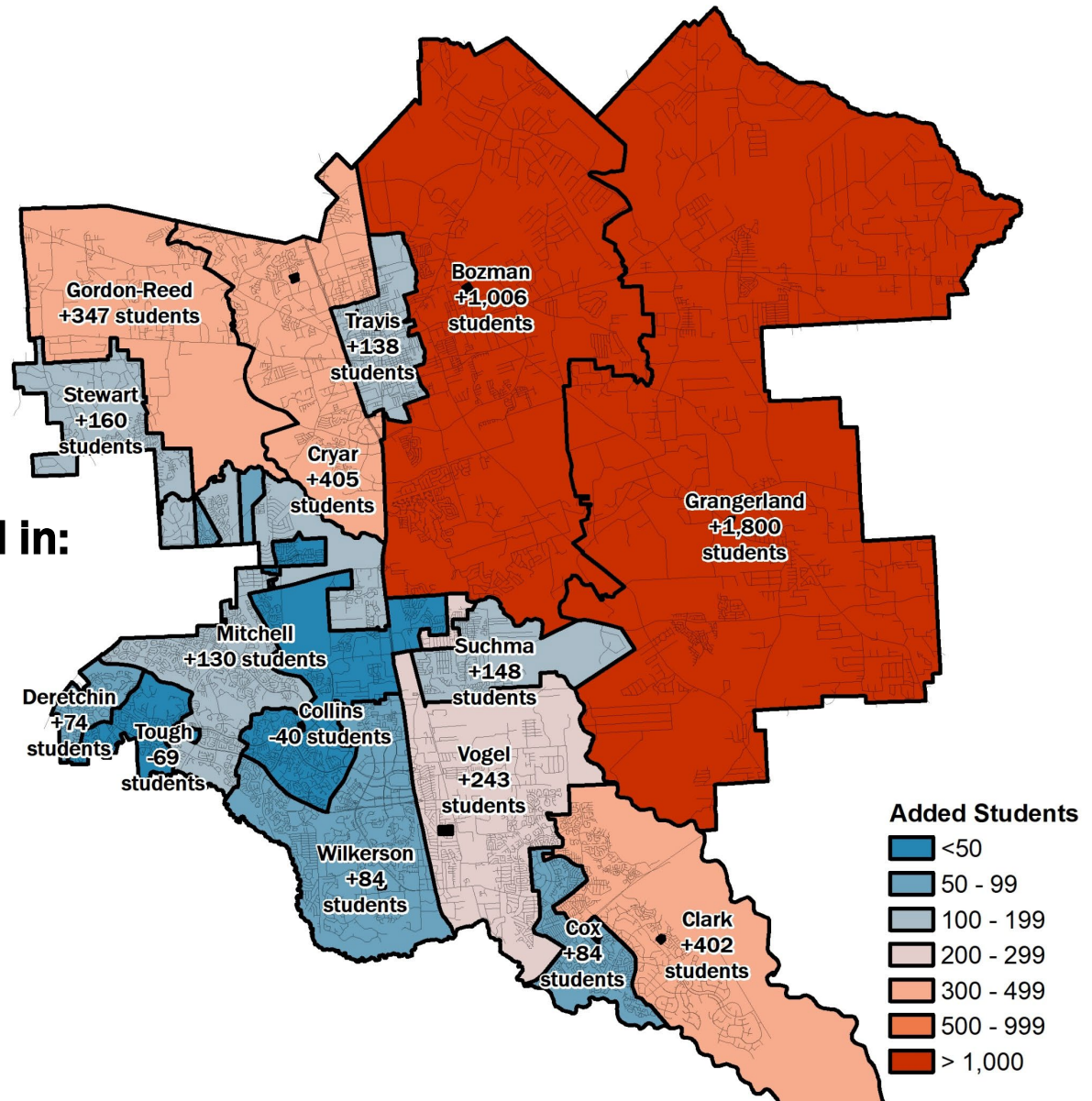
Yellow = >100% utilization

Orange = >110% utilization

Red = >120% utilization

Projected Growth in Intermediate Students

Oct 2022 to Oct 2032



Most growth projected in:

Grangerland
Bozman
Clark
Cryar
Gordon-Reed

Projected 5th–6th Grade Resident Students by Attendance Zone



Intermediate School	Projected Resident 5th-6th Grade Students											
	Capacity	Current	2023-24	2024-25	2025-26	2026-27	2027-28	2028-29	2029-30	2030-31	2031-32	2032-33
Bozman Intermediate	950	1,002	1,015	1,100	1,241	1,332	1,475	1,616	1,720	1,810	1,908	2,008
Clark Intermediate	950	1,073	1,060	1,086	1,143	1,219	1,274	1,345	1,392	1,402	1,433	1,475
Collins Intermediate	775	750	753	746	771	773	760	742	730	711	714	710
Cox Intermediate	950	905	909	952	960	936	956	981	989	978	981	989
Cryar Intermediate	900	766	808	865	918	942	979	1,019	1,067	1,097	1,135	1,171
Deretchin Elementary	375	328	336	353	306	269	311	336	353	365	381	402
Gordon-Reed Elementary	300	167	200	223	248	289	333	370	413	447	477	514
Grangerland Intermediate	1,050	1,178	1,316	1,472	1,658	1,873	2,053	2,230	2,441	2,610	2,787	2,978
Mitchell Intermediate	1,150	1,178	1,175	1,157	1,157	1,201	1,252	1,272	1,290	1,286	1,295	1,308
Stewart Elementary	300	165	205	270	314	298	305	321	319	316	317	325
Suchma Flex	300	362	393	432	437	438	480	498	496	492	497	510
Tough Elementary	375	339	317	308	277	276	291	288	280	273	274	270
Travis Intermediate	700	535	529	560	605	613	590	617	648	654	661	673
Vogel Intermediate	1,100	884	963	1,029	1,059	1,073	1,090	1,117	1,115	1,110	1,118	1,127
Wilkerson Intermediate	750	702	733	746	738	742	756	788	772	758	761	786
Projected Resident Intermediate Students	10,925	10,334	10,712	11,299	11,832	12,274	12,905	13,540	14,025	14,309	14,739	15,246

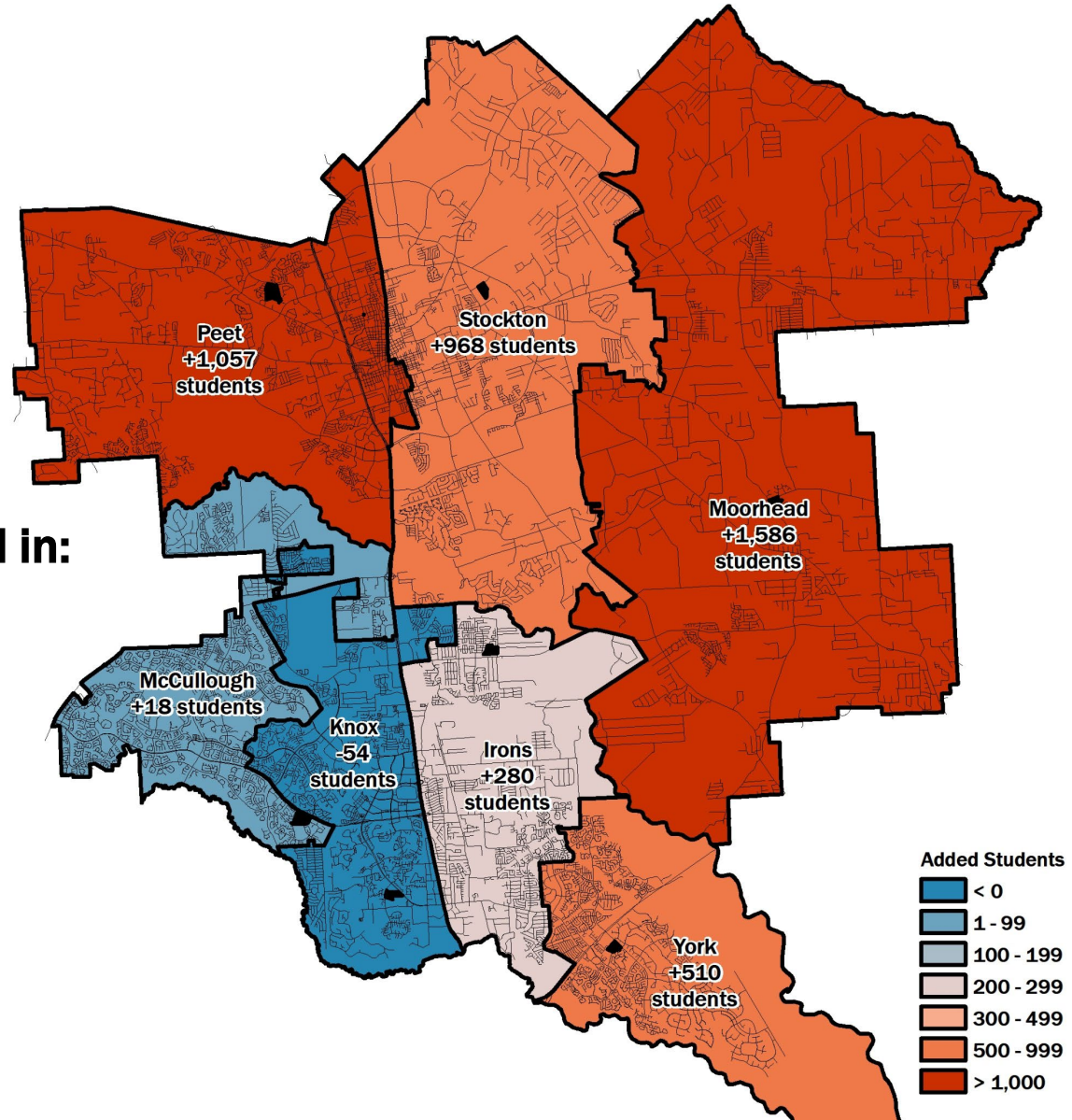
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Red = >120% utilization

Projected Growth in Junior High Students

Oct 2022 to Oct 2032



Most growth projected in:

Moorhead
Peet
Stockton
York

Projected 7th–8th Grade Resident Students by Attendance Zone



Junior High School	Projected Resident 7th-8th Grade Students											
	Capacity	Current	2023-24	2024-25	2025-26	2026-27	2027-28	2028-29	2029-30	2030-31	2031-32	2032-33
Irons Junior High	1,400	1,380	1,338	1,336	1,451	1,543	1,567	1,568	1,611	1,658	1,661	1,660
Knox Junior High	1,350	1,456	1,391	1,341	1,372	1,379	1,398	1,399	1,414	1,441	1,424	1,402
Mccullough Junior High	2,000	2,162	2,144	2,130	2,081	2,063	1,991	2,010	2,113	2,150	2,181	2,180
Moorhead Junior High	1,050	1,407	1,424	1,443	1,611	1,797	2,010	2,256	2,451	2,623	2,827	2,993
Peet Junior High	1,400	1,287	1,369	1,505	1,616	1,760	1,917	1,978	2,055	2,166	2,280	2,344
Stockton Junior High	1,400	1,370	1,365	1,416	1,463	1,602	1,776	1,886	2,002	2,139	2,254	2,338
York Junior High	1,975	2,023	2,023	2,078	2,076	2,152	2,231	2,289	2,371	2,457	2,516	2,533
Projected Resident Junior High Students	10,575	11,085	11,054	11,249	11,670	12,296	12,890	13,386	14,017	14,634	15,143	15,450

Yellow = >100% utilization

Orange = >110% utilization

Red = >120% utilization

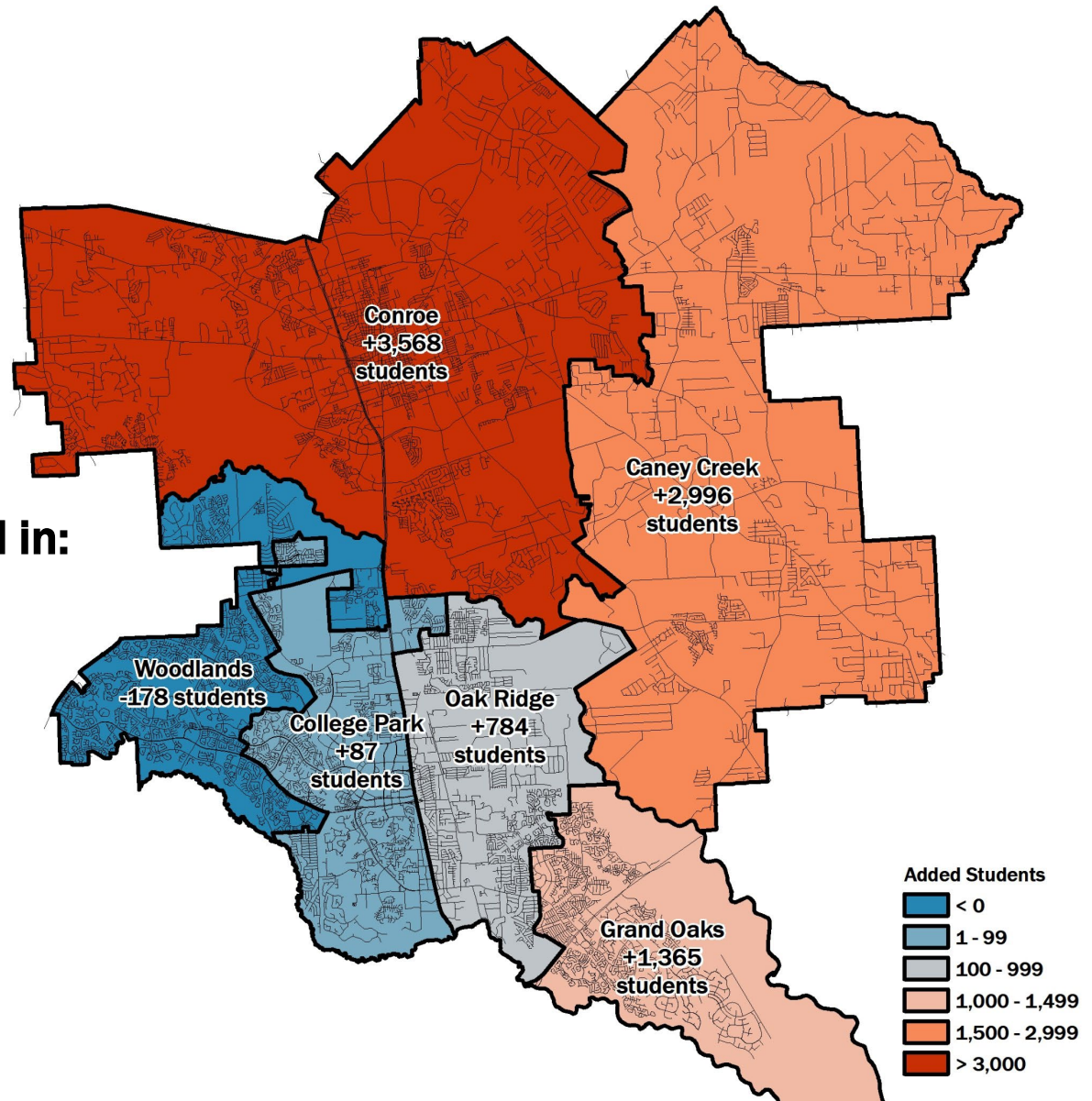
Projected Growth in High School Students

Oct 2022 to Oct 2032



Most growth projected in:

Conroe
Caney Creek
Grand Oaks



Projected 9th–12th Grade Resident Students by Attendance Zone



High School	Capacity*	Current	2023-24	2024-25	2025-26	2026-27	2027-28	2028-29	2029-30	2030-31	2031-32	2032-33
Caney Creek High	2,850	2,579	2,713	2,924	3,060	3,270	3,548	3,868	4,294	4,754	5,169	5,575
Conroe High	4,700	5,066	5,363	5,530	5,762	6,016	6,301	6,798	7,289	7,723	8,237	8,634
Grand Oaks High	3,200	3,614	3,902	4,041	4,197	4,273	4,296	4,425	4,520	4,644	4,802	4,979
Oak Ridge High	3,500	2,637	2,761	2,922	2,987	3,045	3,081	3,132	3,230	3,304	3,367	3,421
Woodlands High	4,500	4,533	4,573	4,565	4,515	4,516	4,396	4,340	4,222	4,230	4,291	4,355
Woodlands College Park High	3,100	3,067	3,139	3,199	3,091	3,086	3,031	2,976	3,041	3,072	3,117	3,154
Projected Resident High School Students	21,850	21,496	22,451	23,181	23,612	24,206	24,653	25,539	26,596	27,727	28,983	30,118

* Capacities at Conroe, Oak Ridge, and Woodlands include both 9th Grade Center + 10th-12th Grade Campus

Yellow = >100% utilization

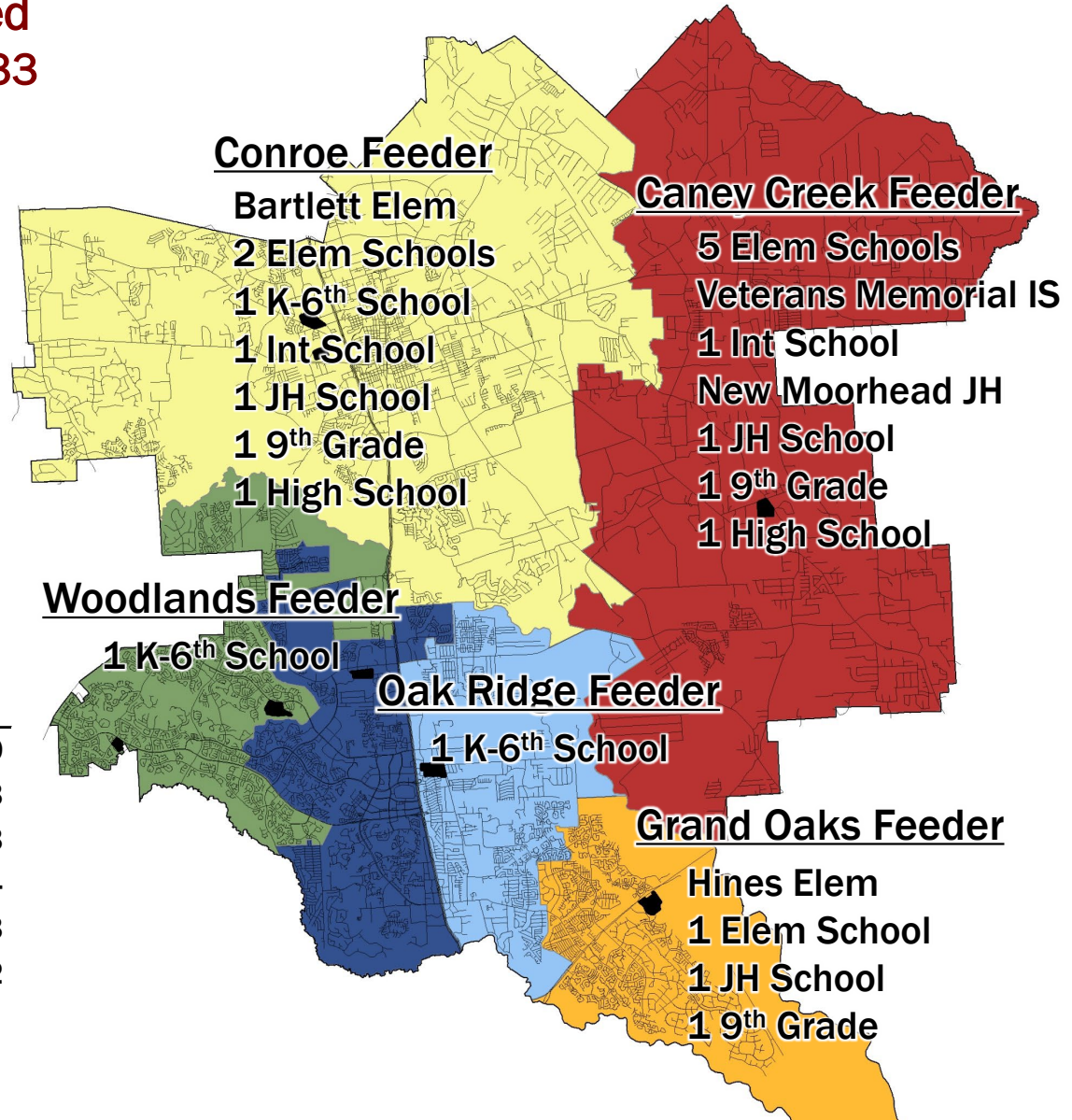
Orange = >110% utilization

Red = >120% utilization

Long-Range Planning Summary

New Campuses Needed

2022-23 through 2032-33



New Campuses Needed 2022-23 through 2032-33

Elementary Schools	10
K-6th Schools	3
Intermediate Schools	3
Junior High Schools	4
9th Grade Campuses	3
High Schools	2

QUESTIONS?





CONROE ISD

DEMOGRAPHIC STUDY

Fall 2022

POPULATION AND SURVEY ANALYSTS
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